



HOMEWORK ACTION PLAN

S SPECIFIC
 M MEASURABLE
 A ACHIEVABLE
 R RELEVANT
 T TIME-BOUND

Name Dustin Stein Class # 420

Dealership Orillia Kia Date 12/18/2023

Current Situation or Challenge to be Addressed:	Address the incoming sales call and lead process with the sales team and utilizing the CRM		
Current Performance Level (include specific measure):	Lacking the effective use of the CRM to report sales calls		
Goal (what do you want to achieve?):	100% of incoming leads (internet and sales calls inputted into the CRM)		
Goal Performance Level (include specific measure)	Currently not 100% of leads are not inputted into the CRM, cannot evaluate sales and spending on leads to to this.		
Goal Start Date:	12/1/2023	Goal End Date:	6/30/2024
First Check-in Date:	12/15/2023	Performance Objective:	Percentage of recorded calls in CRM
Second Check-in Date:	1/5/2024	Performance Objective:	Percentage of Internet leads in the CRM
Third Check-in Date:	2/2/2024	Performance Objective:	Incoming lead process evaluation
Fourth Check-in Date:	3/1/2024	Performance Objective:	Measure closing percentage on incoming leads
How does your goal align with the dealers' vision?	Process over everything, we need to have a proper process in order to get to the next level		
What are the potential benefits of achieving your goal?	Closing more incoming leads which will increase our income and sales		
What are the potential consequences if you don't achieve your goal?	We will not achieve greatness, we will lose out to customers who will eventually buy somewhere else.		
Why is the goal important to you?	Our process is not streamlined, we are losing out on valuable customers		
Potential Obstacles	Sales team not following the process. Management needs to be on them.		

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Potential Solutions	Daily checkins with the sales reps from management.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	We will sell more cars and make more money. Dollars are hard to evaluate as we do not know how much we are losing out on.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Start by evaluating the first process	CRM, Lead Tools, Phone recordings	Sales Manager	Evaluation of lost business	December 1st, Monthly checkpoints
Meetings with sales team to implement new process	CRM, Lead Tools, Phone Recordings	Sales Manager, GM	Proper process to evaluate current performance	Monthly checkins
Work on performance	Sales Managers	Sales Managers	Closing ratio of 6% on internet leads	Weekly checkins
Master Process	CRM	Sales Managers, Sales Team	Closing Ratio of 11% on internet leads	Weekly Checkins
Phone Process Performance	Phone Recordings	Sales Team	Closing ratio of 33% on phone leads	Weekly checkins
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As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.

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Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

Important to look at the performance daily to adjust behaviour of sales reps. Managers are to do daily follow up with sales reps to hold them accountable for their performance.

Describe any planning or implementation meetings conducted as part of development of your plan.

Sales Meetings with sales team to discuss the new process and policies regarding the usage of the CRM.



Sponsor Signature: _____